

Seam

Your systems, finally in sync

AI-powered middleware for family offices

The Problem

40+

hours / quarter spent on manual reconciliation

5 Systems

Custodians, CRMs, GL, reporting, compliance

4 Formats

CSV, PDF, XLSX, proprietary portals

3 Versions

Three versions of the truth at any given time

Analysts spend their days matching statements by hand — not advising clients.

The Market

\$6T+

AUM globally
across family offices

10,000+

Single & multi-family
offices in the US

3–7

Average custodial
relationships per office

~\$2B

TAM for operations
middleware

Family offices are underserved by technology — most still run operations on spreadsheets and email.

Current Workflow

Everything disconnected. Nothing reconciles.

Custodian 1

Custodian 2

Custodian 3

CRM

Reporting

General Ledger

Manual CSV exports → Email attachments → Copy-paste reconciliation → Errors

The Solution

Custodians

Reporting

Seam

AI Middleware

CRM

**General
Ledger**

AI reads documents, connects systems, and reconciles automatically. Days → Minutes.

How It Works

01

Connect Your Systems

API integrations, SFTP feeds, or manual document uploads. Works with any ERP, CRM, or other systems.

02

AI Ingests & Classifies

Our AI reads every document, identifies items, and categorizes them.

03

Automatic Reconciliation

Items are automatically reconciled with your systems.

The Product

Seam Dashboard

Positions

99.2%

Matched

Transactions

97.8%

Matched

Cash Balances

100%

Reconciled

Exceptions

12

Pending Review

Recent Activity

Schwab statement ingested — 847 positions matched

Goldman Sachs capital call classified — forwarded to GL

Exception flagged: \$12,400 variance on Fidelity account #4821

Glassmorphism design • Real-time status • Exception-driven workflow

Technology

Ingest

Classify

Extract

Normalize

Validate

Reconcile

LLM-powered with human-in-the-loop

Frontend

Next.js

AI/ML

AWS Bedrock LLMs

Backend

FastAPI (Python)

IaC

Terraform

Infrastructure

AWS — Aurora, ECS, Bedrock

Compliance

SOC 2 Type II, SEC/FINRA

Business Model

Usage-based pricing that scales with the client

Per-Document Ingestion

Charged per document processed — statements, charge reports, reconciliation cycle. Aligns for high volume, high frequency of deliveries, integration, and

Per-Reconciliation Fee

Platform Fee

Land & expand: Win one family office, expand through their network of advisors and service providers.

Competitive Landscape

	Reducto	Arch	Canoe AI	Seam
Document AI	✓	—	~	✓
Portfolio Reporting	—	✓	—	✓
Alternatives Data	—	—	✓	✓
Multi-System Integration	—	—	—	✓
Auto Reconciliation	—	—	—	✓
Family Office Focus	—	~	~	✓

Seam is the only end-to-end middleware — not just document AI, not just reporting.

Go-to-Market

Direct Sales

Target single-family offices (\$500M+ AUM)
White-glove onboarding and integration
Land with reconciliation, expand to full middleware

Channel Partnerships

Partner with custodians (Schwab, Fidelity, Pershing)
Service provider referral network
Accounting and consulting firm integrations

3 pilot conversations in progress — validating product-market fit with real family office operations teams.

The Team

2–5

Founding
Team

3 mo

MVP
Timeline

Deep

Fintech +
AI/ML Exp.

Core Competencies

Fintech

Prior experience building financial infrastructure and payment systems.

AI & Machine Learning

NLP, document understanding, and reconciliation algorithms at scale.

Advisory board includes former family office CTOs and fintech operators.

Family Office Ops

Deep understanding of operational workflows, custodial processes.

Security & Compliance

SOC 2 audit experience, SEC/FINRA regulatory knowledge for wire

The Ask

Raising \$[X] Seed Round

18-month runway to product-market fit

60%

Engineering

Core platform build,
AI pipeline, integrations

20%

Compliance

SOC 2 Type II cert,
SEC/FINRA licensing

20%

Go-to-Market

First 10 customers,
sales & onboarding

Seam

Your systems, finally in sync

[Founder Name]

[email@seam.ai]

[seam.ai]